



**Contracted Services Provider Application
SFY26 – July 1, 2025 to June 30, 2026**

Provider –	Email –
Address –	Phone –
Billing Contact -	Services Contact -

Service(s)	Provider Rate

The counties you serve -

- | | | | | | |
|------------------------------------|----------------------------------|------------------------------------|-------------------------------------|----------------------------------|------------------------------------|
| <input type="checkbox"/> Appanoose | <input type="checkbox"/> Clinton | <input type="checkbox"/> Davis | <input type="checkbox"/> Des Moines | <input type="checkbox"/> Henry | <input type="checkbox"/> Jefferson |
| <input type="checkbox"/> Keokuk | <input type="checkbox"/> Lee | <input type="checkbox"/> Louisa | <input type="checkbox"/> Lucas | <input type="checkbox"/> Mahaska | <input type="checkbox"/> Monroe |
| <input type="checkbox"/> Muscatine | <input type="checkbox"/> Scott | <input type="checkbox"/> Van Buren | <input type="checkbox"/> Wapello | <input type="checkbox"/> Wayne | |

Provider signature certifies that the above information is current and accurate, and provider will comply with Milestones Consumer Purchase of Service Provider Rules for State Fiscal Year 2026 (July 1, 2025 – June 30, 2026).
 Provider signature certifies there are no known potential conflicts of interest between Milestones and the Provider Agency.

Provider - Signature of Authorizing Official; Title Date

MAAA - Signature of Authorizing Official; Title Date

Email this page to Kantina Schmiers: kschmiers@Milestonesaaa.org
 or mail to:
 Milestones Area Agency on Aging
 509 Jefferson Street
 Burlington, IA 52601-5427

MILESTONES AREA AGENCY ON AGING
Contracted Services – General Rules & Information
SFY26 – July 1, 2025 to June 30, 2026

The Milestones Area Agency on Aging (MAAA) funds home and community-based services for older adults who are of greatest economic need, frail, and at risk of institutionalization. This program supports older adults and family caregivers.

Services available to consumers under contract include:

- Adult Day Services
- FC Information Services
- FC ORC Support Group
- Health Promotion – Evidence Based and Non-Evidence Based
- Legal Assistance
- Material Aid
- Outreach
- Options Counseling
- Transportation

I. FUNDING SOURCE/REIMBURSEMENT STRUCTURE

Authorized by the Older Americans Act (OAA) and Iowa HHS Division of Aging and Disability Services, MILESTONES utilizes federal, state, and local funds as a last resort and only in cases where Medicare, Medicaid, Medicaid Waivers, or third-party payment are not available. Consistent with OAA requirements, contracted providers must provide consumers the opportunity to provide a voluntary contribution to participants receiving services on a monthly basis. 100% of contributions are returned to the Program to directly fund services and support more people.

In the event of a disaster, natural or man-made, MILESTONES reserves the right to shift funds to respond to the disaster. MILESTONES reserves the right to alter the eligibility guidelines for consumers and Provider Agencies in times of disaster in response to the disaster.

The need for critical home and community-based services far outpaces MILESTONES's ability to fund them. As such, providers are to prioritize individuals based on their needs. Individuals with the greatest combination of needs are offered services first.

MILESTONES reimburses providers monthly. MILESTONES staff will provide a roster for each provider. Providers MUST use the roster and reimbursement form to ensure timely payment. Invoices must be submitted for reimbursement by the 10th of the month following the month service was provided. Bills submitted after the 10th of the month may not be honored. Service units shall be reported to the nearest .25 unit.

II. TARGET POPULATION

Providers will determine consumers' eligibility for services and the best available funding source. Priority for services is given to individuals of greatest economic need, greatest social need, at risk for institutional placement, and frail populations.

- a. **Greatest Economic Need.** The need resulting from an income level at or below the poverty line.
- b. **Greatest Social Need.** The need caused by noneconomic factors, which include:
 - Physical and mental disabilities
 - Language barriers
 - Cultural, social, or geographical isolation, including isolation caused by racial or ethnic status, that
 - Restricts the ability of an individual to perform normal daily tasks; or
 - Threatens the capacity of the individual to live independently.
- c. **At Risk for Institutional Placement.** An individual that is unable to perform at least two activities of daily living without substantial assistance (including verbal reminding, physical cuing or supervision) and is determined by the State involved to be in need of placement in a long-term care facility.
- d. **Frail.** The older individual is determined to be functionally impaired because the individual: (A)(i) Is unable to perform at least two activities of daily living without substantial human assistance, including verbal reminding, physical cuing, or supervision; or (ii) At the option of the State, is unable to perform at least three such activities without such assistance; or (B) Due to a cognitive or other mental impairment, requires substantial supervision because the individual behaves in a manner that poses a serious health or safety hazard to the individual or to another individual.

III. CONSUMER REFERRALS

MILESTONES coordinates with health systems, clinics, social service agencies, public agencies, and other community-based groups to identify individuals in need and refer them for more support.

Additionally, MILESTONES encourages individuals, caregivers, and family members to call MILESTONES directly at 855-410-6222 and discuss their situation with MILESTONES staff.

V. PROVIDER QUALIFICATIONS AND ELIGIBILITY STANDARDS

- A. **Minimum qualifications** – To qualify, organizations must
 - a. Operate legally and provide services in the State of Iowa for a minimum of 1 year.
 - b. Offer services that align with the MILESTONES Funding Service Definition Taxonomy.
 - c. Serve at least 1 of the Iowa counties of Appanoose, Clinton, Davis, Des Moines, Henry, Jefferson, Keokuk, Lee, Louisa, Lucas, Mahaska, Monroe, Muscatine, Scott, Van Buren, Wapello, and/or Wayne.
 - d. Timely and accurately submit this agreement, fulfill all requirements and agree to all rules stated herein.
 - e. Have the capacity to comply with Assurances and Conditions. These are available in a separate document posted on the website.

B. Indemnification:

The Work performed by the Provider shall be at the risk of the Provider exclusively. To the fullest extent permitted by law, Provider shall indemnify, defend (at Provider's sole expense) and hold harmless Milestones Area Agency on Aging, affiliated companies and their partners, joint ventures, representatives, members, designees, officers, directors, shareholders, employees, agents, successors, and assigns ("Indemnified Parties"), from and against any and all claims for bodily injury, death or damage to property, demands, damages, actions, causes of action, suits, losses, judgments, obligations and any liability costs and expenses (including but not limited to investigation and repair costs, attorneys' fees and costs and consultants' fee and costs) ("Claims") which arise or are in any way connected with Work performed, Materials furnished, or Services provided under this Agreement by Provider or its agents. These indemnity and defense obligations shall apply to any acts or omissions, neglect or willful misconduct of Provider, its employees or agents whether active or passive. Said indemnity and defense obligations shall further apply, whether or not said claims arise out of the concurrent act, omission, or negligence of the Indemnified Parties, whether active or passive. Provider shall not be obligated to indemnify or defend Milestones Area Agency on Aging, for claims found to be due to the sole negligence or willful misconduct of Indemnified Parties.

Provider's indemnification and defense obligations hereunder shall extend to Claims occurring after this Agreement is terminated as well as while it is in force and shall continue until it is finally adjudicated that any and all actions against the Indemnified Parties for such matters which are indemnified hereunder are fully and finally barred by applicable Laws.

C. Potential Conflicts of Interest with Businesses: Transactions with outside firms must be conducted within a framework established and controlled by the Milestones Area Agency on Aging's Board of Directors. Business dealings with outside firms should not result in unusual gains for those firms or Milestones Area Agency on Aging's employees. Unusual gain refers to bribes, special benefits, and other windfalls designed to ultimately benefit the employer, the employee, or both. Any actual or potential conflict of interest must be disclosed as soon as possible so that safeguards can be established to protect all parties. By signing the Purchase of Services Application and Agreement Form you attest to having no known potential conflict of interest with MILESTONES or their employees.

D. Insurance: Contracted service providers shall have sufficient insurance to indemnify loss of federal, state, and local resources due to casualty or fraud, and to cover the fair market value of the asset at the time of loss.

Required Insurance:

- workers compensation
- unemployment
- property and theft coverage
- fidelity bonding (for persons handling cash)
- facility insurance (for facilities purchased with federal and/or state funds)
- no-fault vehicle insurance (for agency owned vehicles)

Proof of insurance must be provided to MILESTONES upon request. All first-time contracts must submit proof of insurance prior to providing any services under this agreement.

Upon execution of the contract, and prior to the Provider's commencing any work or services with regard to the program, the Provider shall carry **commercial general liability** as well as **professional liability insurance** and the Provider shall supply Milestones Area Agency on Aging, a **Certificate of Insurance and Additional Insured Endorsement**, naming Milestones Area Agency on Aging, as Additional Insureds hereunder.

Additional insured coverage shall apply as primary insurance with respect to any other insurance afforded to Milestones Area Agency on Aging.

The coverage available Milestones Area Agency on Aging, as Additional Insured shall not be less than \$1 million dollars Each Occurrence, \$2 million General Aggregate, \$2 million Products/Completed Operations Aggregate and \$1 million Personal and Advertising Injury limits. Such insurance shall cover liability arising from premises, operations, independent contractors, products-completed operations, personal and advertising injury, and liability assumed under an insured contract (including the tort liability of another assumed in a business contract).

All coverage shall be placed with an insurance company duly admitted in the State of Iowa and shall be reasonably acceptable to Milestones Area Agency on Aging. All Provider insurance carriers must maintain an AM Best rating of "A-" or better. Coverage shall be afforded to the Additional Insureds whether or not a claim is in litigation.

- E. Hiring and Employment Practices** – MILESTONES is an Affirmative Action / Equal Employment Opportunity employer. As such, providers must demonstrate that their personnel policies prohibit discrimination in employment on the basis of race, color, creed, religion, national origin, sex, sexual orientation, gender identity, mental or physical disability, age, or marital status.
- F. Confidentiality** – Service providers shall have procedures to protect and assure the confidentiality of information about the persons they serve. No information will be disclosed without the prior informed consent of an individual and/or his/her legal representative. Disclosures may be allowed by court order or for program monitoring by authorized federal, state or local agencies (which are also bound to protect the confidentiality of consumer information) so long as acting in conformity with the Privacy Act of 1974. All consumer information shall be maintained in controlled access files. Only pertinent consumer information to provide approved service is shared between MILESTONES and Provider Agency. Provider Agency shall not disclose consumer personal data beyond data necessary to provide service. Documents detailing policies and procedures regarding confidentiality must be provided to MILESTONES upon request.
- G. Audit Standards** – The provider agrees to maintain records to easily identify the utilization of MILESTONES funds and make those records available for audit and assessment for three years beyond the end of the award period. Documents detailing policies and procedures regarding audit standards must be provided to MILESTONES upon request.

- H. Provider Standards and Assurance Against Debarment** – No MILESTONES Funds will be contracted to a provider that has been prohibited from participating in the Medicare, Medicaid, or medical assistance programs. Providers shall not be debarred, suspended or otherwise excluded from or ineligible for participation in Federal programs or activities. MILESTONES will perform a debarment evaluation of all providers prior to execution of the Person-Centered Funding Agreement.

The provider shall ensure that all employees providing in-home care to consumers have had a criminal background check and been cleared for said functions in accordance with Iowa Code Chapter 135C.33.

- I. Grievance Policy** – The provider shall have a formal grievance and appeals procedure for perceived discrimination and/or decisions that appear unfavorable to consumers concerning the provision of service. Documents detailing policies and procedures regarding consumer grievances must be provided to MILESTONES upon request.

VI. PROGRAM RULES

- A. Service Taxonomy** – Service definitions have been established for each type of service available for contract. Providers shall comply with these service definitions.
- B. Compliance** – MILESTONES will audit all providers from time to time, either in the form of a desk audit or an on-site audit. Upon request, agencies shall provide the following:
- Documents detailing policies and procedures regarding compliance with applicable employment laws that prohibit discrimination.
 - Proof of insurance
 - Documents detailing policies and procedures regarding confidentiality
 - Documents detailing policies and procedures regarding audit standards
 - Documents detailing policies and procedures regarding consumer grievances
 - Documents detailing services provided and services billed.
- C. Non-Exclusivity** – It is expressly understood and agreed by MILESTONES and the Provider that contracts are not exclusive. Nothing in the Contract shall be construed as creating an exclusive arrangement with the Provider Agency or Prohibit MILESTONES from either acquiring similar, equal or the like services from executing additional contracts with other entities or sources.
- D. Termination** – Funds awarded by MILESTONES may be terminated at any time for violations of any terms and requirements of the funding source or change in fiscal resources of the agency impacting funding capacity.

MILESTONES and Provider may terminate this Agreement, without cause and for convenience, upon thirty (30) days written notice to the non-terminating party.

MILESTONES reserves the right to shift funds from one taxonomy or Provider to another taxonomy or Provider, with or without cause or convenience upon thirty (30) days written notice.

- E. Proof of Service Provided** – Provider shall verify that service units provided to consumers match the units on the monthly submitted roster. When billing discrepancies

are identified, MILESTONES staff will contact the Provider to discuss the situation and request verification that services were provided. MILESTONES will not reimburse services if the provider cannot provide proof that they were provided.

- F. Consumer No Show Policy** – In situations where consumers who are not home or did not cancel prior to scheduled service provision, the Provider shall call consumer and consumer's emergency contact. The Provider shall not bill MILESTONES or the consumer for service provision beyond the time necessary to contact the consumer and MILESTONES as described above.
- G. Mileage** - MILESTONES does not reimburse mileage. Services begin when Provider arrives at the consumer's location and ends when the Provider leaves the consumers location.
- H. Cost Sharing** – Consumers shall encumber no financial obligation by receiving services under this agreement. Providers **shall not bill the consumer** for any rate difference in the event the agreed upon rate is less than the Provider's standard rate.
- I. Maximum Reimbursement Rate** – Providers shall not charge MILESTONES a rate higher than the Provider rate submitted in this bid.

VII. REPORTING AND PAYMENT

Upon execution of this agreement, MILESTONES will provide a service roster to all Providers. Providers must submit their monthly rosters accurately and on time.

A. Reimbursement Request for Contracted Services

Providers receive payment for services monthly by submitting the approved Reimbursement Request to MILESTONES. Reports must cover a one-month period – from the first day of the month through the last day of the month. **To receive payment, reports are due to MILESTONES by the 10th day of the following month and must be correct and complete.** Payment will be issued within no more than 30 working days following the approval. Incomplete and/or incorrect submission will delay payment.

E-Mail monthly rosters and reimbursement requests to: kschmiers@milestonesaaa.org

Providers may mail Reimbursement Requests to:

Milestones Area Agency on Aging
509 Jefferson Street
Burlington, IA 52601-5427



**MILESTONES AREA AGENCY ON AGING
CONTRACTED SERVICES DEFINITIONS
FY26 - July 1, 2025 - June 30, 2026**

1. **Adult Day Care** - Services or activities provided to adults who require care and supervision in a protective setting for a portion of a 24-hour day. Includes out of home supervision, health care, recreation, and/or independent living skills training offered in centers most commonly known as Adult Day, Adult Day Health, Senior Centers, and Disability Day Programs. (Source: NAMRS)
2. **FCG Information Services** - A Public and media activity that conveys information to caregivers about available services, which can include an in-person interactive presentation to the public conducted; a booth/exhibit at a fair, conference, or other public event; and a radio, TV, or Website event (Source: Title III SPR Appendix A Definitions). Unlike Information and Assistance, this service is not tailored to the needs of the individual.
3. **FCG Support Groups**- A service that is led by a trained individual, moderator, or professional, as required by state policy, to facilitate caregivers to discuss their common experiences and concerns and develop a mutual support system. Support groups are typically held on a regularly scheduled basis and may be conducted in person, over the telephone, or online. For the purposes of Title III-E funding, caregiver support groups, would not include “caregiver education groups,” “peer to peer support groups,” or other groups primarily aimed at teaching skills or meeting on an informal basis without a facilitator that possesses training and/or credentials as required by state policy. (Source: Title III SPR Appendix A Definitions)
4. **Health Promotion (Non-Evidence Based)** - Health promotion and disease prevention activities that do not meet ACL/AoA’s definition for an evidence-based program as defined at ACL’s website. Activities may include those defined in the OAA (Section 102(14)) for example; (A) health risk assessments; (B) routine health screening; (C) nutritional counseling and educational services for individuals and their primary caregivers**; (E) programs regarding physical fitness, group exercise, and music therapy, art therapy, and dance-movement therapy; (F) home injury control services; (G) screening for the prevention for depression, coordination of community mental and behavioral health services, provision of educational activities, and referral to psychiatric and psychological services; (H) educational programs on the availability, benefits, and appropriate use of preventive health services covered under title XVIII of the Social Security Act (42 U.S.C. 1395 et seq.); (I) medication management screening and education; (J) information concerning diagnosis, prevention, treatment, and rehabilitation concerning age-related diseases and chronic disabling conditions; (K) gerontological counseling; and (L) counseling regarding social services and follow-up health services based on any of the services described in subparagraph (A) through (K). The term shall not include services for which payment may be made under titles XVIII and XIX of the Social Security Act (42 U.S.C. 1395 et seq., 1396 et seq.).
5. **Health Promotion (Evidence Based)** - Activities related to the prevention and mitigation of the effects of chronic disease (including osteoporosis, hypertension, obesity, diabetes, and cardiovascular disease), alcohol and substance abuse reduction, smoking cessation, weight loss and control, stress management, falls prevention, physical activity, and improved nutrition. Activities must meet ACL definition for an evidence-based program, as presented on ACL’s website. (Source: OAA)
6. **Legal Aid** - Legal advice and representation provided by an attorney to older individuals with economic or social needs as defined in the OAA, Sections 102(23) and (24), paralegal or law student under the

direct supervision of a lawyer and counseling or representation by a non-lawyer where permitted by law (Source: OAA).

7. **Material Aid-Home Modification/Repairs** - Provision of aid on a limited basis in the form of goods or services such as food (not meals), smoke detectors, eyeglasses, medical equipment and supplies and security devices that support safety (excluding emergency response system). Prior to authorizing and delivering rental assistance or housing support, the AAA must ensure the benefit supports sustainable housing and directly supports the consumer and not supporting another household. No dollars should be paid directly to a consumer, family member other caregiver. Prior to use of this service, verify no other funding mechanism is available such as Medicare, private insurance, etc. Home Modification/Repairs includes ramps, structural repairs, etc. (Source: ADS)
Provision of aid on a limited basis in the form of goods or services such as food (not meals), smoke detectors, eyeglasses, medical equipment and supplies and security devices that support safety (excluding emergency response system). Prior to authorizing and delivering rental assistance or housing support, the AAA must ensure the benefit supports sustainable housing and directly supports the consumer and not supporting another household. No dollars should be paid directly to a consumer, family member or other caregiver. Prior to use of this service, verify no other funding mechanism is available such as Medicare, private insurance, etc. (Source: ADS)
8. **Outreach** - Provision of one-on-one interventions initiated by an agency or organization for the purpose of identifying potential consumers and encouraging their use of existing services and benefits. (Source: ACL) Outreach does not include social media posts, presentations, panel discussions, etc.
9. **Transportation** - Services or activities that provide or arrange for the travel, including travel costs, of individuals from one location to another. Does not include any other activity. (Source: NAMRS/ Title III SPR Appendix A Definitions)